



12/9/2019: Email sent to all Cardinal Fiscal Officers and Cardinal Financial users (excluding VDOT).

Subject: Cardinal Upgrade Impacts for Statewide Users

In this communication you will find details regarding the most impactful changes Cardinal Financials users will see after the deployment of technical upgrades on **Tuesday, December 10, 2019**. Outlined below are specific changes, a screenshot of the change where appropriate, and the corresponding updated course materials and job aids.

General Impacts

- Navigation has been simplified when running reports. A brief summary is below:
 - New **Report Manager** link displays on the **Process Monitor – Process List** page when a report is run in Cardinal. This link provides easy access to the **Report Manager** page without the additional navigation.

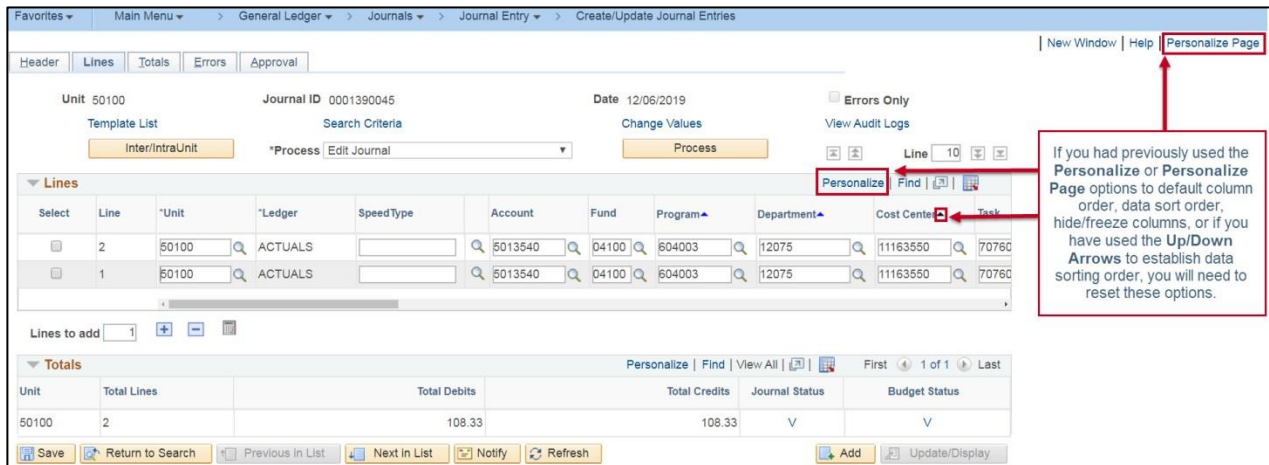
Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	10648937		BI Publisher	V_RAP0998	PPS1_ANGELA.GRAY	12/04/2019 8:54:06AM EST	Success	Posted	Details

- New **Return** button is available on the **Report Details** page, which brings the user back to the **Report Manager** listings.

Name	File Size (bytes)	Datetime Created
SQR_VGLR001_10648862.log	2,222	11/21/2019 11:55:31.601121AM EST
vglr001_10648862.PDF	12,054	11/21/2019 11:55:31.601121AM EST
vglr001_10648862.out	19,304	11/21/2019 11:55:31.601121AM EST

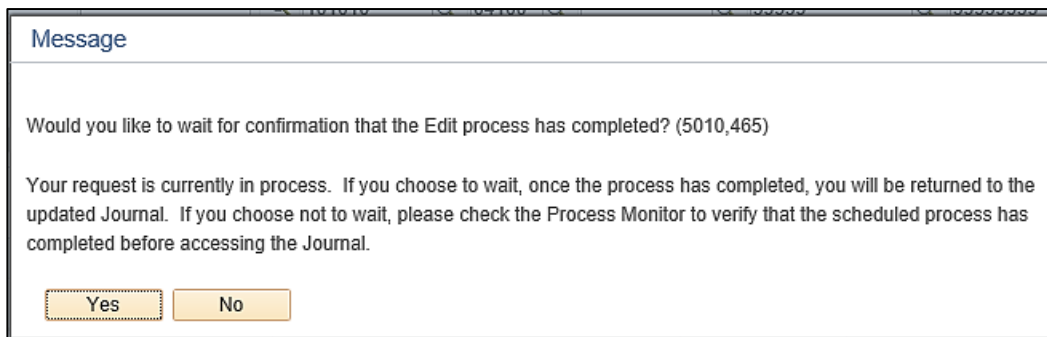
Updated Course: [NAV220: Cardinal Reporting](#) (Pages 19; 43)

- **Grid Personalization:** After the upgrade, any user-created grid personalization (used to set field order or sorting order on a page) will revert back to the Cardinal default and will need to be reapplied if desired.



General Ledger (GL)

- New pop-up message displays when editing or posting a manual journal entry from the **Journal Lines** tab, which requires a response.



- You must select either **Yes** or **No** to start the Edit process. If you click:
 - **Yes:** The journal edit process will start and you would remain on the **Journal Lines** tab
 - **No:** The journal edit process will start, you will receive the process instance, and you will be redirected to the **Create/Update Journal Entries** inquiry page

Note: If you leave the page without selecting either the Yes or the No button, the journal edit process **will not run**.

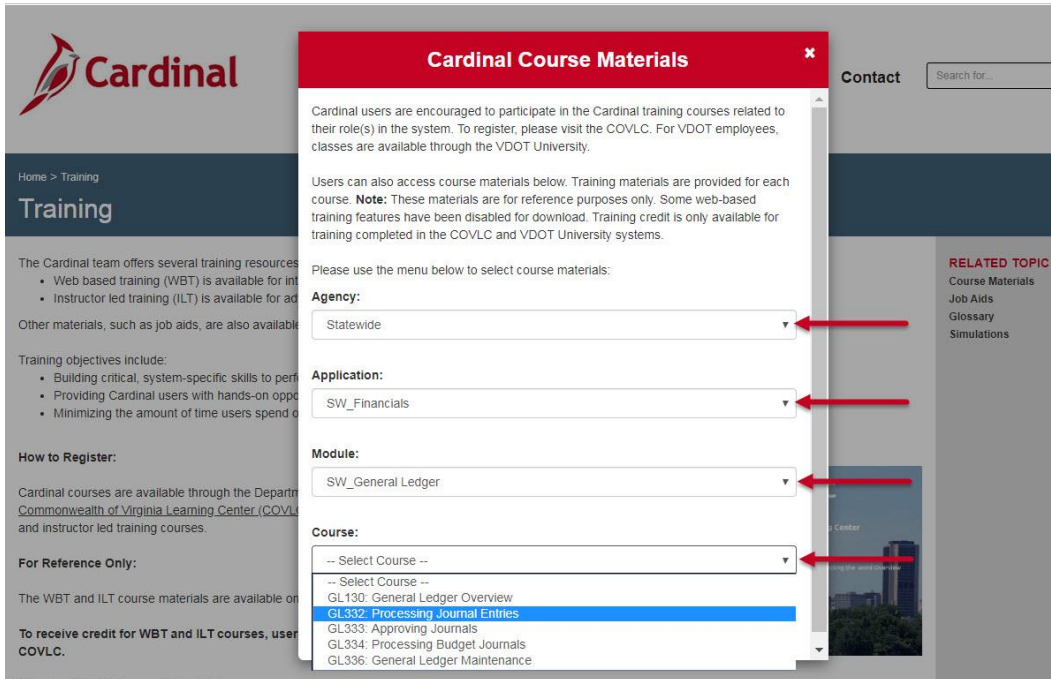
Updated Course: [GL332: Processing Journal Entries](#) (Pages 29-34; 104-109)

Course Materials & Job Aids

Course materials and job aids have been updated on the Cardinal website to reflect these changes and are available for download. You can use the links above to access each resource or you can navigate to course materials and job aids by following the steps below:

On the Cardinal website (www.cardinalproject.virginia.gov) navigate to:

- Training
 - Select Course Materials
 - Select Agency: Statewide
 - Select Application: SW_Financials
 - Select Module
 - Select Course
 - Click Submit



The screenshot shows the 'Cardinal Course Materials' modal window. The modal has a red header with the title 'Cardinal Course Materials' and a close button. The main content area of the modal contains the following text: 'Cardinal users are encouraged to participate in the Cardinal training courses related to their role(s) in the system. To register, please visit the COVLC. For VDOT employees, classes are available through the VDOT University.' Below this, it says: 'Users can also access course materials below. Training materials are provided for each course. **Note:** These materials are for reference purposes only. Some web-based training features have been disabled for download. Training credit is only available for training completed in the COVLC and VDOT University systems.' The modal then prompts the user to 'Please use the menu below to select course materials:' and provides four dropdown menus: 'Agency:' (with 'Statewide' selected), 'Application:' (with 'SW_Financials' selected), 'Module:' (with 'SW_General Ledger' selected), and 'Course:' (with '-- Select Course --' selected). The 'Course:' dropdown is open, showing a list of course options: '-- Select Course --', 'GL130: General Ledger Overview', 'GL332: Processing Journal Entries' (highlighted in blue), 'GL333: Approving Journals', 'GL334: Processing Budget Journals', and 'GL336: General Ledger Maintenance'. Red arrows point to each of these four dropdown menus. In the background, the 'Cardinal' website is visible, showing a sidebar with 'Training' selected, a main content area with 'Cardinal Course Materials' selected, and a 'RELATED TOPICS' sidebar with links to 'Course Materials', 'Job Aids', 'Glossary', and 'Simulations'.

On the Cardinal website (www.cardinalproject.virginia.gov) navigate to:

- Training
 - Select Job Aids
 - Select Agency: Statewide
 - Select Application: SW_Financials
 - Select Module
 - Select Job Aids
 - Click Submit



Cardinal Job Aids

A Cardinal Job Aid is a printable reference document with step-by-step instructions on how to perform a task in the Cardinal system.

Please use the menu below to select a job aid:

Agency: Statewide

Application: SW_Financials

Module: SW_General Ledger

Job Aid: -- Select Job Aid --
-- Select Job Aid --
Agency to Agency (ATA) Transactions Information Sheet
GL: Excel Active X Control Fix
GL332: Chart of Accounts Mapping
GL332: Chart of Accounts Overview
GL332: Combination Edits Review Tools
GL332: Crosswalk from FAACS to Cardinal
GL332: Journal Interface Processing
GL332: Uploading Spreadsheet Journals
GL334: Replacing Outdated Budget Upload Files
GL334: Uploading Budget Spreadsheet Journals

RELATED TOPICS
Course Materials
Job Aids
Glossary
Simulations

Updates have been made to additional course materials and job aids to reflect other minor changes you may notice in the upgraded application. For a listing of the documents that have changed, [click here](#).

As a reminder, the Cardinal application will be unavailable to users until approximately **10:00 a.m. on Tuesday, December 10, 2019**. You will receive a notification when Cardinal is back online.

If you encounter a Cardinal issue that cannot be resolved using the provided resources, please email the VITA Customer Care Center (VCCC) at vccc@vita.virginia.gov and reference “Cardinal Upgrade – Statewide” in the subject line. The VCCC is used to handle tracking and routing for all Cardinal help desk tickets.

Regards,

The Cardinal Team